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ABSTRACT

A study examined the ways in which adult educators increase learner load. The primary objective of the study, which was conceived within the context of Howard McClusky's concept of margin, i.e., the ratio between the burdens on adult bears and the strengths he/she has to bear them, was to identify the specific instructor characteristics that decrease adult learner margin to the point where a learning endeavor becomes less than optimum for the learner. Fifty-four adult learners were asked to provide their views concerning the loads that their instructors placed on them. Then, a panel of four experts familiar with the concept of instructor-generated load sorted all of the responses according to the following five categories: attitude, attitude/behavior, behavior, behavior/task, and environment. Coupled with the attitude and task categories, behavior characteristics accounted for 78 percent of the perceived instructor-generated load. The environmental and task categories played only a small part in the load perceived (2.54 and 8.92 percent, respectively). Perhaps the most striking finding was that every adult learner asked could relate at least one example of instructor-generated load from his or her own learning experiences. (Appendixes to this paper include a list of definitions of categories used in the study and an illustration of the inclination to infer negatives from positives.) (MN)

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INSTRUCTOR-GENERATED LOAD: THE ADULT LEARNER'S VIEW

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INSTRUCTOR-GENERATED LOAD: THE ADULT LEARNER'S VIEW

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INTRODUCTION

Within the context of Howard McClusky's (1970) concept of Margin, this research identifies specific instructor characteristics that decrease adult-learner Margin to the point that a learning endeavor becomes less than optimum for the learner.

Margin = Power:Load

McClusky's concept of Margin can be stated simply as being the ratio between the burdens that an adult bears and the strengths that he/she has to bear them. McClusky's terms are Load and Power: Load being the aggregate burdens self-imposed by the person and imposed by society; Power being the aggregate personal and societal resources on which he/she may draw to cope with the Load. The difference between these aggregates is Margin.

Load components can be financial obligations, civic duty, negative self-concept, family responsibility, socioeconomic status, and career responsibility, among others. Power components can be financial resources, family support, positive self-concept, socioeconomic status, drives, and career rewards, among others. It is entirely possible that one component can be either an addition to Load or to Power. It is entirely possible that what may be a source of Power to one person may be tremendous Load to another person.

Whether adults participate in organized learning activities, according to McClusky (1970), assumes a degree of Margin in the lives of adult learners. McClusky applied his concept of Margin to the participation pattern of adult students in organized learning activities. More recently, Main (1979) applied the concept of Margin to the learning setting itself in which the determination of a learner's Margin becomes the focal point of the PLM (Power-Load-Margin) Teaching Model. Day and James (1984) have applied the concept to the role the determination of Margin might play in an educational brokerage setting. Cookson (1985) has referred to the concept of Margin as "discretionary energy." However, one of the many dimensions of Margin not adequately addressed in the literature is the degree to which instructors of adults may decrease an adult learner's Margin by increasing the learner's Load in a learning activity: instructor-generated Load.

PURPOSE

The immediate purpose of this inquiry is to gather information on how adult educators increase learner Load and to categorize that information. It is believed that this research will yield a foundational basis for future research. The ultimate purpose of this inquiry is to be able to disseminate information to adult education professionals as to how they may be increasing learner Load and thus detrimentally affecting a learning outcome and to encourage an awareness that will improve their ability to facilitate adult learning. As professionals, we must be willing to bear the bulk of the burden of learning failure.

CURRENT LITERATURE

Current literature on effectively teaching adults often focuses on one or more of the many aspects of the teaching/learning relationship. Approaches toward analyzing this relationship in terms of effectiveness may focus on the teacher/teaching component or the learner/learning component. In most cases, as will be seen, the emphasis, regardless of the component, is on the positive. The negatives are rarely identified.

Sellen (1980), in specifying positive characteristics of an expert/teacher, says, "All of these are hard to measure (p. 26)" and Sinclair (1981), in an ERIC Opinion Paper, claims that measurement of teacher effectiveness is difficult. Knowles (1984) says "One of the more or less futile quests of educational researchers over the years has been the identification of the characteristics that distinguish excellent teachers from mediocre teachers (p. 103)." Considering the continuing controversy surrounding the problem of evaluation of teaching effectiveness - which will not be considered here - any investigation into the subject of the positive aspects or the negative aspects of teaching effectiveness must be eclectic in order to respond to the specific problem at hand, in this case, in what ways do teachers of adults - effective or otherwise - increase the Load that the learner bears? As will be seen, virtually all research in this matter is directed toward identifying the positive attributes of effective teachers of adults leading to the temptation to infer the negatives from the positives (See Appendix II for an example). However, if a purpose of this study is to identify the ways in which instructors of adults increase learner Load, this cannot be done by simple inference of the opposites of the positive characteristics, traits, and behaviors of the instructors.

In the literature, one finds that many of the same characteristics are identified and confirmed. There is nothing inherently wrong with these additions to the literature, however, one does become inured to repetitions. One approach, for the reader, is to note the redundancies, either in fact or in concept, for the exceptions are rare. There are distinctions in findings but few differences.

Sellen (1980) claims that a primary characteristic of a potential expert/teacher is practical experience but adds that three other attributes

are "self-confidence, the desire to share his or her know-how, and the ability to easily relate to people (p. 26)."

Knox (1980) mentions five personality characteristics of effective teachers of adults: self-confidence, informality, enthusiasm, responsiveness, and creativity. These are, obviously, positive attributes. In his review of the literature of the psychological characteristics associated with teaching effectiveness, Chesley (1983) found that the psychological characteristics - in descending rank order of reference - of enthusiasm, sense of humor, flexibility, tolerance, and empathy were most often cited. The relationship between personality characteristics and effective teaching was established by Whittington (1983) who found a correlation of 0.79 and Sherman and Blackburn (1975) who found a correlation of 0.77 between the two (cited in Chesley, 1983). That personality characteristics are important, then, is established. But do these findings suggest that a poor personality determines ineffective teaching? Not necessarily. That - as the lawyers say - would be assuming a fact not in evidence. What these findings do suggest is that additional research needs to specifically address the characteristics of ineffective teachers of adults.

A less oblique approach to determine the characteristics of effective teachers was used by Kelly and Kelly (1982). They analyzed the background, education, and teaching styles of professors who had won awards for teaching and found the following commonalities: an enjoyment of teaching, an enjoyment of the subject matter, a command of language and delivery, a sense of humor, the manifestation of teaching as a theatrical performance, an apparent earnest attempt to make students learn, and active involvement with students by use of question-and-answer discussions. With slight contrast, Hathaway (1982) lists the following factors that relate to teacher effectiveness: a demonstrated belief in student ability to learn, making expectations clear and understood, establishment of procedures recognized by students, consistent feedback to students, and the use of frequent reinforcers in the teaching setting. These attributes are more behavior oriented, often resulting from personal characteristics. In either case, the direction of the identified characteristics is positive.

In a more general sense, Knowles (1980, 1984), has emphasized the importance of the establishment of a learning climate in adult teaching and has pointed out his belief that instructor behavior is probably the most important factor in establishing this climate. His propoundment of the theory of andragogy emphasizes those aspects of adults as learners that should be reckoned with by adult educators.

This brief review of the literature on effectively teaching adults, then, suggests that an effective teacher would have practical experience and be able to relate easily to people; would have a sense of humor, be flexible, tolerant, and empathetic; would enjoy teaching and the subject matter; would make expectations clear, use recognized procedures, use reinforcers and feedback; have involvement with students, a command of the language and demonstrate a belief in the students' ability to learn. Yet, the question still remains: within the context of McClusky's concept of Margin, what

might such a paragon do to increase learner Load?

METHOD

Subjects---

Subjects were participants in a series of workshops entitled "Adjusting Your Margin: Making Space in Your Life" and other adult learners who were personally interviewed. The total number of respondents was 54.

Through workshop procedures - discussions, exercises - participants became familiar with the concepts of Load, Power, and Margin. At the end of the workshop written responses were elicited to the following question:

> "Please reflect on your experiences as an adult student and see if, at some time, the teacher with whom you worked was ever a component of your Load or Power. For what reason(s) was he she a component of your Load or Power?"

Responses were written on forms supplied by the workshop leader. Response was not mandatory but a typical workshop had a response rate of over 50%. More importantly, of the total number of responses collected, 100% had at least one comment on how an instructor had been a component of, or increased, the learner's Load.

For individually interviewed subjects, a discussion on Margin was followed by questioning designed to elicit more expansive answers than were obtained from workshop participants. Each interview was "semistructured" (Borg and Gall, 1983) and comments and questions by the interviewer were designed to lead the respondent toward giving data to meet the interviewer's objectives. (Borg & Gall, p. 443) In view of the exploratory nature of the process of investigating instructor-generated Load, it was felt that the use of "leading questions" (Borg & Gall, p. 453) would aid in the accumulation of useful data. Since simple reporting of the preliminary data was anticipated with no statistical conclusions of a significant nature to be drawn or promulgated, the interviewer was free to use the appropriate techniques necessary to facilitate interviewee expansiveness.

Data Analysis---

The method for categorizing responses was to type out each one on a separate slip of paper. A panel of four experts, familiar with the concept of instructor-generated Load, was asked to specify a term to identify the nature of each individual response. Initially, four categories were identified: Attitude, Behavior, Task, and Environment.

Under each of these categories, responses were placed according to the judgment of the members of the panel. During this procedure, it was determined that additional categories were needed to account for the responses that could be considered to be members of more than one specific category. Additional categories were Attitude/Behavior and Behavior/Task. Consequently the categories are: Attitude (A), Attitude/Behavior (A/B), Behavior (B), Behavior/Task (B/T), and Environment (E). A list of definitions may be found in Appendix I.

This procedure yielded two things: first, duplicates were identified, and second, unanimity among the panel was achieved as to the taxonomy establishing a degree of construct validity.

Response Distribution

	A	A/B	B	B/T	T	E
Number	16	44	53	26	14	4
					Total =	157
Percentages	10.19	28.03	33.76	16.56	8.92	2.54
					Total =	100

Total number of participants responding was 54 giving a mean number of responses per respondent of 2.9.

Chi square

Observed		Expected	Difference	Chi Square	Significant at
A	16	26.16	-10.16	3.94954	NA
A/B	44	26.16	17.94	12.16610	.05 level
B	53	26.16	26.84	27.53770	.01 level
B/T	26	26.16	-.1600	9.78638E-4	NA
T	14	26.16	-12.16	5.65236	NA
E	4	26.16	-22.16	18.77160	.02 level

INSTRUCTOR-GENERATED LOAD or HOW WE DO IT TO THEM

A sampling of selected responses:

Some of the responses to the question lend themselves to one-on-one correspondence with certain basic assumptions regarding teaching adults. For example, one person's response was, "Treated as an inferior due to no education, i.e., college. Therefore, had to be handled as a 6th grader. Lack of confidence in students as learners. Critical of suggestions, views, opinions, interpretations, etc. He managed to belittle and suppress." With this student's perception of the instructor's attitude and behavior in mind, answer this question: Was the learner's experience likely to be a positive one?

Another respondent said, "It seemed the only 'right' way to analyze the system we were working on was the instructor's way." Once again, denial of the value of the adult learner as a resource or capable of self direction. One can sense the frustration in the learner, the increased Load.

More direct comments reflecting the manner in which an instructor may impose additional Load came from one workshop participant very succinctly: "Arrogant style, elitist attitude, regulatory-restrictive."

A classic response - in the sense that it has been said or thought by just about everybody who has ever taken a course or class as an adult - was advanced by one participant: "Teachers thinking that their class is the only thing you do in life." In this way, an instructor's attitude becomes the burden, the increased Load, because the student must factor that attitude into the academic burden already imposed by the instructor. Rather than learning to meet the learner's needs, learning Load is increased with the additional factor of trying to meet the instructor's attitudinal expectations.

In a personal interview, a Reference Librarian in Albany County, Wyoming, relates that when she returned to Graduate School, the thing that increased her Load was her assumption that she would be treated as an equal. The fact that her instructors did not (in her mind) treat her as equal did not enhance her learning experience. The 'relationship' in and of itself, then, became a factor of Load but based, as she said, on HER assumption coupled with the actual behavior of the instructors. Note that she is willing to bear the responsibility of a wrong assumption, but, as the interview proceeded, it also became clear that though she felt her mistake was in having the assumption, the assumption was justified. In this light, Knowles (1980) contends that an antecedent to effective adult learning is the "learning climate" and that teacher behavior "probably influences the character of the learning climate more than any other single factor." (p. 47) The subject mentions her evaluation of some of the work as being 'laborious' in the context that she (and other students) did not believe it to be relevant. Learner inclination to judge required material is a characteristic of adults who believe themselves capable of self direction and self motivation and who also believe that learning should apply to

their needs. In her particular instance, Load was increased by, one, instructor behavior and, two, academically.

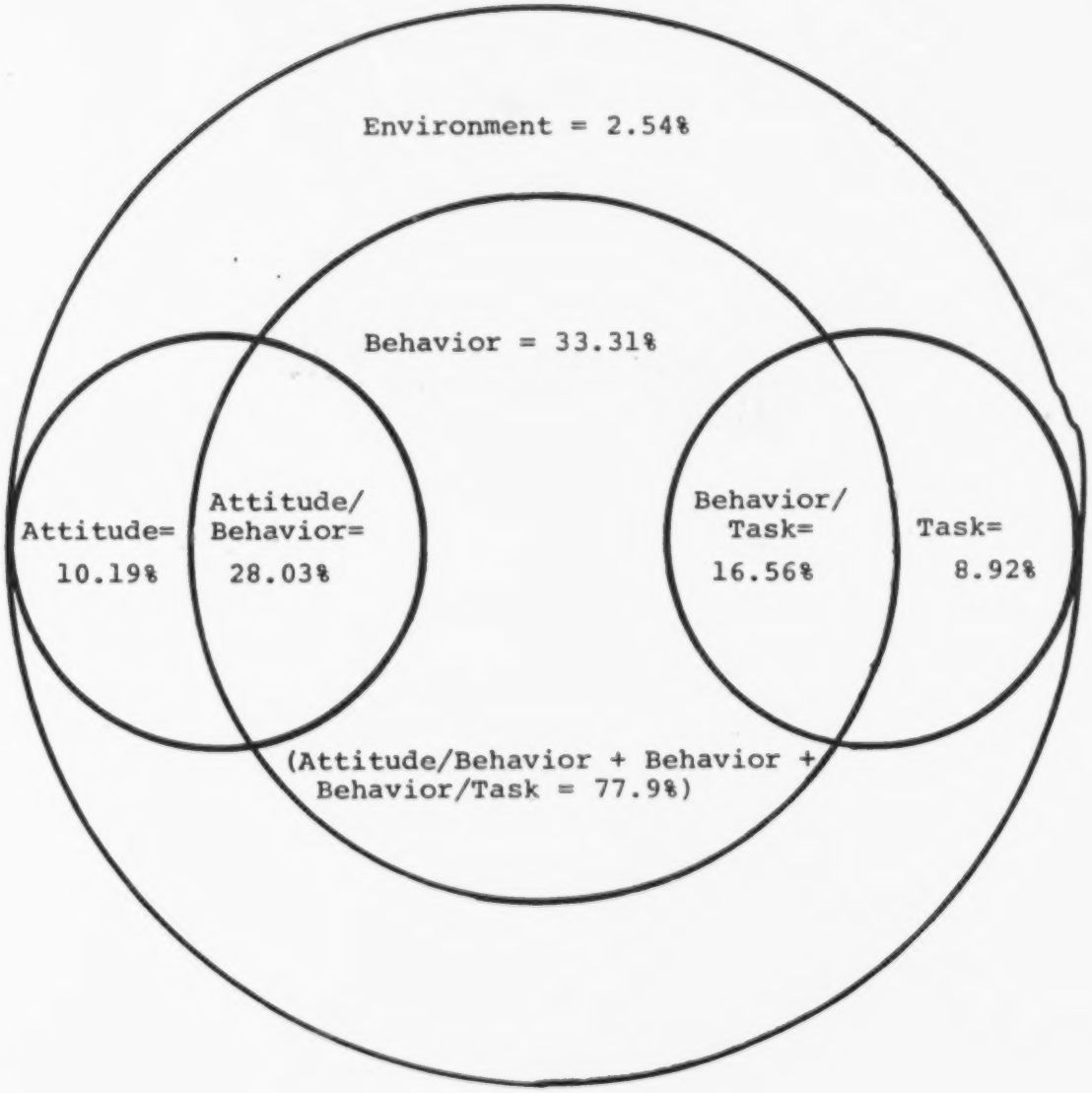
In another interview, a woman, reflected that she had been in a class where her relationship and rapport with the instructor was very positive. However, the instructor generated increased Load in her situation by virtue of a negative relationship with other students. She says that the instructor's negative relationship with the other students made her "uncomfortable," thus affecting her learning situation. In this case, the peripheral relationships, which were influenced by the instructor, increased her Load.

Another example of being made to feel uncomfortable comes from a man who interpreted his instructor's attitude toward the class as "You should know this!" He says, "His attitude toward the class made me uncomfortable." In this case, however, he had corresponding Power in terms of his own attitude toward learning: he said, "I will go through anything to get through it."

The foregoing comments should give an indication of the variety of ways in which adult learners perceive instructor-generate Load.

RELATIONSHIPS

The relationship within the taxonomy can be visualized with the following diagram:



CONCLUSIONS

The author believes that increased awareness of instructor-generated Load on the part of individual professionals in the field of adult education will enhance the teacher-student relationship in ways that will reduce the number of negative outcomes for adult learners.

The distribution suggests that Environmental and Task categories play a significantly small part in the adult learner's perception of instructor-generated Load. At this point, regarding the Task category, the author and his advisor have concluded that adult learners tend to accept EXPECTED academic Load generated by instructors. Adult learners also tend to accept the environmental aspects of a learning situation that they perceive to be not within the purview of the instructor.

The distribution, however, suggests the magnitude that the Behavior component plays in perceived instructor-generated Load. Coupled with both the Attitude category and the Task category, Behavior characteristics account for 78 percent of the perception. In absolute numbers alone, the Behavior component of this taxonomy tends to confirm Knowles' contention that instructor behavior plays the most significant part in establishing a learning climate. Coupled with the Attitude/Behavior and Behavior/Task components, the significance is substantial on the face of it.

However, the striking fact of this preliminary research is that when adult learners have been exposed to the concept of instructor-generated Load, EVERY adult learner could relate an example from his/her own learning experiences. Because of this fact, the author believes that additional research in the specific area of instructor-generated Load is necessary. This exploratory study has laid a foundation for more extensive investigation. The taxonomy and conclusions as to relationships so far established are not inviolate: they are simply a foundation upon which to build.

IMPLICATIONS FOR FUTURE RESEARCH

Future research should address the following questions:

1. What is the composite character of instructor-generated Load?

2. To what degree do individual adult-learner comments reflect the views of a population?

3. To what degree do instructors of adults perceive that a particular attitude or behavior or task or environment increases learner Load?

4. Do adult learners and instructors of adults perceive particular attitudes, behaviors, tasks and environments significantly differently in the increase of learner Load?

The implications of this research can be summed up succinctly: If we, as professional adult educators, are to facilitate adult learning to help people improve the quality of their lives, we must address the possibility that we - even with the best of intentions - may be a significant factor in increasing learner Load. This research addresses that possibility and points the way to future research.

APPENDIX I
DEFINITIONS

ATTITUDE: Refers to the instructor's "learned predispositions to respond positively or negatively to certain objects, situations, institutions, concepts, or persons. As such, they [attitudes] possess cognitive (beliefs or knowledge), affective (emotional, motivational), and performance (behavior or action tendencies) components." (Aiken, 1980, p. 1)

Examples: "Lack of confidence in students as learners."
"I didn't feel wanted in the class."

ATTITUDE/BEHAVIOR; Instructor behavior or demeanor that seems to express an attitude to the learner.

Examples: "Treated as an inferior."
"I felt I was almost set up for failure."

BEHAVIOR: Refers to an instructor's overt physical actions or demeanor.

Examples: "Trying to elicit a response and waiting for an answer that just won't come."
"Scratching his back on the wall while he lectured."

BEHAVIOR/TASK; A behavior or demeanor that adds to the academic burden with no apparent benefit.

Examples: "Instructors who are not prepared in their subject matter."
"Over explaining."

ENVIRONMENT: The physical conditions and surroundings in which the learning endeavor takes place.

Examples: "An item on the edge of a desk about ready to fall off."
"No refreshments."
"Room too hot."

TASK: A required academically-oriented burden.

Examples: "Effort invested seemed wasted."
"No explanation of what is expected - how measurement will occur."

SEMISTRUCTURED: "...the interviewer first asks a series of structured questions and then probes more deeply, using open-ended questions in order to obtain more complete data...The semistructured interview is generally most appropriate for interviews in education. It provides a desirable combination of objectivity and depth and often permits gathering valuable data that could not be successfully obtained by any other approach (Borg & Gall, p. 442)"

APPENDIX II

An illustration of the inclination to infer negatives from positives took place in a video-taped session with Dr. Malcolm Knowles at the University of Wyoming, March 27, 1985.

JAMES: "You have written that instructor behavior is probably the most important entity in climate setting in a learning situation. Do you have any 'bag' of 'don'ts,' things that instructors do that are conducive to a negative learning situation?"

KNOWLES: "Well, I think the opposites of the characteristics that I presented...for a climate that is conducive to learning.

Certainly one is the physical set-up in which learners are put in the position to receive transmitted information... An instructor who expresses and behaves with a low level of respect for the learners, is arrogant toward them, doesn't get to know who they are, embarrasses them, makes fun of them.

Certainly, an instructor who induces, encourages, and rewards competitiveness....who shows favoritism, who is judgmental rather than supportive, who expresses impatience with adult stumblings, who punishes risking, new ideas, new behavior.

Certainly, an instructor who exercises authority, plays a role of an authority figure, who gets his psychic rewards from boasting how good he is and acting out of arrogance.

Is that enough?"

JAMES: "Yes, that's great."

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